

## Staff Guide to Interfolio Periodic Evaluations

Please review [Interfolio guides](#) or call Interfolio’s help-line at 877-997-8807 as needed. College RTP reps can add faculty users; Faculty Advancement can add staff users. Unless otherwise instructed by your College RTP rep, *admin coordinators manage department-level committees and operations, and College RTP Reps manage college-level committees and operations.*

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### Log-in

Go to [www.interfolio.com](http://www.interfolio.com) → Sign In → Partner Institution → San Diego State University → Single Sign-On → username is SDSUId and associated SDSUId password.

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### Department/School Coordinator or College RTP Rep: Create review bodies and verify reviewers.

[Follow the Interfolio guide to add new and remove committee members.](#) (Do not select the star next to these names unless you want to assign someone as a committee manager; committee chairs do not need this designation.) Verify:

- Each committee has a minimum of three (3) tenured faculty members of any rank.
- Faculty are not serving at multiple levels of review.
- Department chairs/school directors may not serve on their own departmental committee if they plan to write a chair/director letter.
- If a department/school does not have enough faculty to constitute a committee, it may elect members from related disciplines.
- Chair / Director or Dean information is current.

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### Department/School Coordinator: Create case.

[Follow the Interfolio guide for Case Creation.](#)

- Case Settings: Only use templates with your department/school prefix. → Review & Settings: you may add submission deadline; do not change internal case sections, step dates or add required documents → Will the Candidate Submit a Packet? Select “Yes.” → Would you like to notify the candidates now? Select “No”.

[Follow the Interfolio guide for Notifying the Candidate](#) and use **sample memo below:**

TO: Candidate  
FROM: Department Coordinator or College RTP Representative  
SUBJECT: Periodic Evaluation Case Available

Dear Faculty Member,

Please click the link in this email to access your case. When you are prompted to log in, go to > Sign In > Partner Institution > select San Diego State University from the dropdown menu and you will be directed to Single Sign On. Log in with your SDSUId as the username, and password associated with your SDSUId.

Please visit the Faculty Advancement website ([fa.sdsu.edu](http://fa.sdsu.edu)) to assist you in this process. Should you need further assistance, first contact your department or school coordinator.

Once you have notified the candidate, change the case status to “Case with Candidate”. The candidate will upload their materials and submit their packet; the case will lock automatically.

If a candidate needs to make changes: Only department/school coordinators and College RTP Reps can provide access to make changes: navigate to the candidate’s case→identify the section that needs to be edited→select “Unlock.” Notify the candidate when the section has been unlocked. The packet will automatically lock after the candidate resubmits.

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**Department/School Coordinator: Move Case Forward After Submission**

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After you receive email notification that the candidate has submitted their case, send the [Case Forward](#) and update case status.

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**Department/School Coordinator or College RTP Rep: Non-Submission of Materials for Temporary Faculty**

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All temporary faculty who are scheduled for evaluation are expected to provide a complete set of materials by the deadline. Temporary faculty who do not provide a complete set of materials by the deadline cannot be evaluated fairly by academic units and thus cannot be provided careful consideration for work in the subsequent AY. Faculty and administrators who evaluate temporary faculty members should not offer an evaluation (i.e., “satisfactory” or “unsatisfactory”) if complete materials are not provided by the candidate.

If a faculty member does not provide materials use the **sample memo below** to contact the faculty member via share with candidate ([Interfolio guide here](#)):

TO:	Faculty Member
FROM:	Department Coordinator or College RTP Representative
SUBJECT:	Evaluation Incomplete – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Faculty Member,

An evaluation of your performance could not be conducted due to non-submission of required materials. This message serves as notice that temporary faculty members who do not participate in the evaluation process may not be eligible for careful consideration by the academic unit for available work or a subsequent appointment.

Update case status to “Case Closed - No Materials Submitted” and do not move the case forward to reviewing bodies.

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**Department/School Coordinator or College RTP Rep: Review, upload, and share letters**

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Review. (Letter/Form Templates here for [probationary/tenured](#) and [temporary](#)) Please verify:

- Letter/form is signed. If it is not signed, send it back to the reviewer(s).
- Letter date matches the share date on the timeline ([probationary/tenured](#); [temporary](#)).
- Candidate name is spelled correctly.
- Correct period of review. ([probationary/tenured](#); [temporary](#))
- Proper recommendation language is used, including appropriate academic year effective date.
- Response/rebuttal paragraph is included and the date is calculated correctly (10 calendar days after the letter date/date in which you are sharing the letter; if the 10<sup>th</sup> day falls on a weekend or holiday/campus closure, select the next business day).
- Copy notations are correct.

Upload:

- Save the letter using the following naming convention: Evaluator, Description - Candidate Last Name, First Initial (e.g., *Dean’s Recommendation Letter – Smith, J*)
- Open the case→navigate to “Department/School Review” or “College Review”→select “Add File”→select “Add New File”→upload the saved letter→select “Save.”

Share with candidate ([Interfolio guide here](#)), using the **sample message below**:

- To initiate the response/rebuttal feature, select “Enable” under File Response on the Details pane.
  - Type “Response/Rebuttal” under Message Reason.
  - Type the response/rebuttal deadline date under Deadline (10 days after the date in which you are sending the evaluation to the candidate). Note: this is a hard deadline; candidates will not be able to submit a response after the deadline set, which is 11:59pm EST / 8:59pm PST on that date.
  - Use the dropdown menu under Section for Response to select the section in which the response/rebuttal statement will be saved. Select the “Department/School Review” or “College Review” section.

TO: Faculty Member  
FROM: Department Coordinator or College RTP Representative  
SUBJECT: Evaluation from \_\_\_\_\_ [Department/School Peer Review Committee or Department Chair/School Director or Dean] – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Faculty Member,

Please select the “View Files” link in this email which will prompt you to log in to Interfolio. On your dashboard, under “Your Action Items” click on your name to view the packet; OR, click “Your Packets” on the left side navigation and select the case, open the “Shared Committee Files” tab of the case packet and files shared with you will appear listed.

**For Dean notifications, strike message below.**

After viewing your shared files, if you are allowed to respond to the content of the file, you will see a link labeled "Send Response," and a due date for when your response is due (which is within 10 days following receipt of an evaluation). **Please do not attach any documents to your response/rebuttal letter.** Also note: the “Response Due” date in the top left corner of the materials reader; the system will not allow you to upload a response or rebuttal after 11:59 pm EST / 8:59 pm PST on that date, or change or preview your response.

Share with Committee Members ([Interfolio guide here](#)), **using the sample below:**

TO: Previous Reviewing Bodies  
FROM: Department Coordinator or College RTP Representative  
SUBJECT: Evaluation Letter from \_\_\_\_\_ [Department/School Peer Review Committee or Department Chair/School Director] – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Reviewer,

Please log-in to Interfolio to view a copy of the [Department/School Peer Review Committee or Department Chair/School Director] evaluation for the above-named faculty member

Update case status (e.g., “Pending Dean’s Review”) and move the case forward to the next reviewing body by the timeline deadline. (Interfolio will provide an automated email message to the next level of review.)

For temporary evaluations: When the final evaluation is complete, update final status to “Satisfactory” or “Unsatisfactory”.

*Note: Corrected or Revised Copies*

- *If minor editorial changes are needed (i.e., procedural errors, incorrect cc, formatting, grammar), prepare a CORRECTED COPY. Date of the letter does not change. Old version is “hidden” in the file by selecting “Edit” → “Edit Settings” → “Access” → and clicking “Administrators Only” → “Update”.*
- *If substantive changes are needed (i.e., recommendation) prepare a REVISED COPY. Date of the letter changes. Original copy is preserved in the file.*

*Upload corrections and revisions to the appropriate section of the case, using the following naming convention: COPY TYPE Evaluator, Description - Candidate Last Name, First Initial (e.g., CORRECTED Dean’s Recommendation Letter – Smith, J).*

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### **Department/School Coordinator or College RTP Rep: Share Response/Rebuttals**

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**If you are notified that a candidate has submitted a response/rebuttal<sup>1</sup>, share the letter only (no attachments permitted) with Committee Members ([Interfolio guide here](#)), using the sample message below:**

TO: Reviewing Body  
FROM: Department Coordinator or College RTP Representative

<sup>1</sup> NOTE: Department/School coordinators/College RTP Representatives will receive an automated message from Interfolio indicating “Response to Shared File” as long as they remain listed first in the review step.

**SUBJECT:     Response/Rebuttal Notification - LAST NAME of CANDIDATE, FIRST INITIAL**

Dear [Reviewing Body Receiving Response/Rebuttal],

The above-named faculty member has submitted a response/rebuttal to your evaluation. Please log-in to Interfolio, open their case, under ["Department Review"] find and review the response/rebuttal addressed/titled to your reviewing body. Or, if you no longer have access to the case, log-in to Interfolio, on your dashboard select "Files Have Been Shared With You", select "Committee Shared Files, and "View Files."

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**Closing or Deleting Cases and PAF Filing**

If a candidate resigns, retires, requests a withdrawal from the process, or a case has been created in error, delete the case and contact your College RTP Representative.

If the wrong template has been used or a candidate's name or email is spelled incorrectly, the case must be deleted and recreated.

Temporary Faculty evaluations are to be printed and filed in the official personnel file in the unit.